

# Hedge Fund Letters Attribute Extraction Pipeline

A full walkthrough of what the notebook is doing, how to interpret the results, and how to reproduce it.

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## Step 0. Overview: What problem are we solving?

Hedge funds send quarterly investor letters to their limited partners. These letters usually include:

- performance numbers (e.g. "The fund returned +8.7% in Q1 2025"),
- benchmark comparisons (e.g. "The S&P 500 returned +5.8%"),
- narrative from the portfolio manager (market commentary, strategy, etc.),
- legal disclaimers ("past performance is not indicative of future results...").

Right now, all of that information is trapped in PDFs.

This project builds a **repeatable pipeline** that does the following for every PDF in a folder:

1. Opens the PDF, and even if it's just a scanned image (not copyable text), runs OCR (Optical Character Recognition) to "read" the text.
2. Sends that extracted text to an OpenAI model and asks it to return **structured data as strict JSON**:
  - fund name
  - manager name
  - quarter/year being discussed
  - fund's reported performance that quarter
  - benchmarks it was compared to and their reported returns
  - all legal/hedge language
  - the main body of the letter with disclaimers removed
3. Calculates "alpha": how much better or worse the fund performed compared to the benchmark.
4. Stores the cleaned output in a table using Pandas (DataFrame) and then exports that to CSV.

In plain English:

**This pipeline converts messy hedge fund letters into a clean spreadsheet of performance, benchmarks, and narrative tone.**

All of this is captured and saved in a master CSV you can analyze in Excel or Python.  
[oai\\_citation:1#HedgeFundLetters\\_AttributeExtraction.ipynb - Colab2.pdf](#)

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# 1. Environment setup (Running this on a new machine / Colab)

Before you can run the pipeline, you must install the necessary tools and libraries.

In a fresh Colab session you would run:

```
!apt-get update -qq
!apt-get install -y tesseract-ocr poppler-utils -qq

!pip install pdfplumber pdf2image pytesseract pillow pandas numpy
yfinance openai python-dotenv rapidfuzz -q
```

## Python packages I install:

- pdfplumber: extracts text from PDFs
- pdf2image: converts PDF pages to images one page at a time
- pytesseract: runs OCR on images to read text
- pillow: handles images in Python
- pandas and numpy: for data analysis and DataFrames
- yfinance: downloads market data like S&P 500 prices
- openai: talks to the OpenAI model
- rapidfuzz: for fuzzy string matching (not heavily used but available)

**Why this matters:** If someone tries to run my code without installing these packages first, it'll error out immediately with ModuleNotFoundError. So Step 1 to reproduce is to install these dependencies exactly once in the runtime.

```
In [2]: # # # =====
# # # 0. Setup / installs
# # # =====

# !apt-get update -qq
# !apt-get install -y tesseract-ocr poppler-utils -qq

# !pip install pdfplumber pdf2image pytesseract pillow pandas numpy yfinance ope
# # After this cell runs in Colab, continue with the rest.
```

# Step 1: Imports and Basic Configuration

In my next code section, I import Python modules and set up global settings.

## Core Python libraries I import:

- `os` : to talk to the operating system, list files, build file paths
- `re` : for regular expressions and pattern matching in text
- `json` : to handle JSON since I'll get machine-readable output from the AI model
- `datetime as dt` : for turning "Q3 2025" into concrete dates like July 1 to Sept 30, 2025

- `math` : for math operations
- `io` : for stream-like I/O tools
- `typing` : to specify function return types

### **PDF and OCR stack:**

- `pdfplumber` : tries to read actual selectable text from PDFs - works great for born-digital PDFs like generated investor letters
- `pdf2image.convert_from_path` : turns a PDF page into a picture
- `pytesseract` : reads text from that picture using OCR
- `PIL.Image` from Pillow: image object type used in OCR

**Why I need both pdfplumber and OCR:** Because investor letters are often shared as scans. A scan is basically a photo of text, not real text. If I try to copy/paste from those PDFs, I get nothing. So my pipeline:

- Tries normal text extraction first using pdfplumber
- If a page is basically empty with less than 30 characters, assumes it's a scanned image
- Falls back to converting the page to an image and using OCR to read it visually

### **Data and analysis libraries:**

- `pandas as pd` : for tables of data using DataFrames
- `numpy as np` : for numeric operations like `np.nan` for missing numbers

### **Finance data:**

- `yfinance as yf` : lets me download market prices for tickers like `^GSPC` for S&P 500 so I can compute how the benchmark index actually performed in that quarter

### **OpenAI setup:**

I set my OpenAI API key as an environment variable and feed it to the OpenAI library so it can authenticate requests.

**Security note:** An API key is a secret. I should not hardcode and share it in plain text. Anyone with that string can spend my credits. Instead, in Colab I can:

- Use input to paste it privately at runtime
- Use Colab secret forms for better security

### **PDF\_DIR configuration:**

I set `PDF_DIR` as the folder where I'll keep all my hedge fund letters in PDF form. The rest of my code loops through every .pdf file in this directory.

To reproduce, I must:

- Put my PDFs into this folder, or change this path
- In Colab, upload PDFs manually via the left panel or via `google.colab.files.upload`

- Save them into PDF\_DIR

```
In [3]: # =====#
# 1. Imports & basic config
# =====#

import os
import re
import io
import json
import math
import datetime as dt
from typing import List, Dict, Any

import pdfplumber
from pdf2image import convert_from_path
import pytesseract
from PIL import Image

import pandas as pd
import numpy as np
import yfinance as yf

import openai # OpenAI official Python library
             # We'll use Chat Completions with response_format=json_object, pe

# ---> IMPORTANT: set your API key here in Colab (SAFEST way)
# You can also do:
#   import os
#   os.environ["OPENAI_API_KEY"] = "sk-proj-bCDq_LSVhy4m4Z8Z6xEpkpUF7msy6vYJEmDLVS
#
os.environ["OPENAI_API_KEY"] = "sk-proj-GIicmcSLNThWYqY621SYECJpjpujTf-nlMTov8M

openai.api_key = os.getenv("OPENAI_API_KEY")

# Directory of PDFs. In Colab, you can upload files via the file browser (Left p
PDF_DIR = "/content/drive/MyDrive/HedgeFund"

os.makedirs(PDF_DIR, exist_ok=True)

# If you're testing with the 3 provided PDFs in this chat, you can do:
# from google.colab import files
# uploaded = files.upload()
# for name, data in uploaded.items():
#     with open(os.path.join(PDF_DIR, name), "wb") as f:
#         f.write(data)
#
# Then proceed.
```

## Step 2: Converting Each PDF into Plain Text

I have a function called `extract_text_from_pdf` that takes a PDF file path and returns the full readable text of that letter, no matter if it was digitally generated or just a scan.

### Here's what my function does step by step:

#### Step 1 - Open and try text extraction:

- Opens the PDF with pdfplumber.open
- Pdfplumber tries to read text that is actually encoded into the PDF
- For each page, it extracts text if available, otherwise gets an empty string

#### Step 2 - Check if text is empty:

- If the page text is shorter than 30 characters, assumes that page is just an image scan
- Why? Because a scanned PDF page usually gives nothing when I try to extract machine text

#### Step 3 - OCR fallback if needed:

- Uses convert\_from\_path to render that one PDF page into PIL images
- For each resulting image, calls pytesseract.image\_to\_string
- This asks Tesseract OCR to please read the text from this image like reading a screenshot
- Joins those OCR text chunks together

#### Step 4 - Combine all pages:

- Whether the text came from pdfplumber or from OCR, appends the text to a running list
- After all pages are processed, glues them together with blank lines

#### Step 5 - Clean up whitespace:

- Replaces weird tabs and multiple spaces with a single space
- Collapses giant stacks of blank lines down a bit
- This makes the downstream LLM prompt cleaner
- Garbage in leads to garbage out, so cleaning helps

#### Step 6 - Return full text:

- Returns the full text as one big string of the PDF's text in reading order

**Why this matters:** The AI model that extracts structured data only sees text. If I fail to OCR, I'll miss content like "We returned +9.9% this quarter" and then I get null for performance. So this function builds reliability by handling both digital PDFs and scanned PDFs automatically.

In [4]:

```
# =====
# 2. Utilities: PDF -> full text (with OCR fallback)
# =====

def extract_text_from_pdf(pdf_path: str) -> str:
    """
    Extract text from a PDF:
    
```

```

1. Try pdfplumber text extraction.
2. If a page comes back basically empty, render it as an image + run Tessera
Returns the concatenated text (page order preserved).
"""
all_pages_text = []

with pdfplumber.open(pdf_path) as pdf:
    for page_idx, page in enumerate(pdf.pages):
        txt = page.extract_text() or ""
        # crude heuristic for "empty" text → run OCR
        no_real_text = (len(txt.strip()) < 30)

        if no_real_text:
            # render this single page to image(s)
            pil_images = convert_from_path(pdf_path,
                                            first_page=page_idx+1,
                                            last_page=page_idx+1)
            ocr_text_chunks = []
            for img in pil_images:
                ocr_text = pytesseract.image_to_string(img)
                ocr_text_chunks.append(ocr_text)
            txt = "\n".join(ocr_text_chunks)

        all_pages_text.append(txt)

full_text = "\n\n".join(all_pages_text)

# normalize whitespace a bit
full_text = re.sub(r"\t+", " ", full_text)
full_text = re.sub(r"\n\s*\n\s*\n+", "\n\n", full_text)
return full_text

```

## Step 3: Quarter Helper Functions

I have helper functions to interpret and compare returns in the right timeframe. Two functions are especially relevant.

### **The quarter\_to\_dates function:**

If the letter says "Q3 2025", this function converts that to real calendar dates:

- Q1 → Jan 1 to Mar 31
- Q2 → Apr 1 to Jun 30
- Q3 → Jul 1 to Sep 30
- Q4 → Oct 1 to Dec 31

It returns those as strings like "2025-07-01" and "2025-09-30". This matters because markets trade daily, and I'll want to know what the S&P 500 did between those specific dates.

### **The get\_index\_return\_pct function:**

This computes how much an index went up or down during a quarter. Here's how it works:

**Step 1 - Convert dates:**

- Converts start\_date and end\_date strings like "2025-07-01" into actual Python datetime objects

**Step 2 - Download price data:**

- Uses yfinance.download to pull price data for that ticker between those dates
- Example tickers: ^GSPC for S&P 500 or ^RUT for Russell 2000

**Step 3 - Find closing prices:**

- Looks for the adjusted closing price on the first day and the last day in that period

**Step 4 - Calculate return:**

- Computes:  $(\text{last price} / \text{first price} - 1) \times 100$
- So if the index went from 100 to 110, the return is 10 percent

**Step 5 - Return as float:**

- Returns that number as a float

**Why is this useful?** The fund letter often tells me benchmark performance like "The Russell 2000 returned 5.8 percent". But I don't have to take their word for it. I can:

- Calculate the benchmark myself from market data for that same quarter
- Compare and audit marketing claims

**Note:** In my notebook version, this function is defined but not yet integrated into the final CSV export workflow. It's there to support future validation and cross-checking.

In [5]:

```
# =====
# 3. Quarter math helpers
# =====

def quarter_to_dates(q_num: int, year: int):
    """
    Map quarter number + year -> (start_date, end_date) as YYYY-MM-DD strings.
    We assume calendar quarters:
        Q1 = Jan 1 - Mar 31
        Q2 = Apr 1 - Jun 30
        Q3 = Jul 1 - Sep 30
        Q4 = Oct 1 - Dec 31
    """
    if q_num == 1:
        start = dt.date(year, 1, 1)
        end = dt.date(year, 3, 31)
    elif q_num == 2:
        start = dt.date(year, 4, 1)
        end = dt.date(year, 6, 30)
    elif q_num == 3:
        start = dt.date(year, 7, 1)
        end = dt.date(year, 9, 30)
    elif q_num == 4:
        start = dt.date(year, 10, 1)
```

```

        end = dt.date(year, 12, 31)
    else:
        raise ValueError(f"Quarter {q_num} invalid")

    return start.isoformat(), end.isoformat()

def get_index_return_pct(ticker: str, start_date: str, end_date: str) -> float:
    """
    Pull index/ETF prices from Yahoo Finance using yfinance, compute % return in
    We use Adjusted Close.
    Formula: (last_adj_close / first_adj_close - 1)*100.
    """
    # yfinance likes datetime, not string
    start = dt.datetime.fromisoformat(start_date)
    # add 1 day to end_date so yf includes last trading day
    end = dt.datetime.fromisoformat(end_date) + dt.timedelta(days=1)

    df = yf.download(ticker, start=start, end=end, progress=False)
    if df.empty:
        return np.nan

    # In newer yfinance versions with auto_adjust=True (default), 'Close' is the
    price_col = 'Close' if 'Close' in df.columns else 'Adj Close'

    if price_col not in df.columns:
        print(f"Warning: Could not find price column ('Close' or 'Adj Close') for")
        return np.nan

    first_price = float(df[price_col].iloc[0])
    last_price = float(df[price_col].iloc[-1])
    ret_pct = (last_price / first_price - 1.0) * 100.0
    return ret_pct

```

## Step 4: Using an LLM to Extract Structured Data

I have a function called `call_openai_extract_structured` that is the NLP extraction brain of my pipeline. It takes the raw text from the PDF and asks a Large Language Model to return a strict JSON object with the important data fields.

### How I design my prompt:

I build two messages for the OpenAI Chat Completions API.

### The system message tells the model:

- You are a forensic analyst
- Read quarterly hedge fund and partnership letters
- Return STRICT JSON following the schema
- Do not add commentary or assume facts not in the letter
- Extract: fund\_name, manager\_name, quarter\_number, quarter\_year, fund\_quarter\_return\_pct, benchmarks with their returns, hedge\_clauses, and body\_text\_no\_hedge

- Collect ALL legal hedge, disclaimer, forward-looking, "cannot promise future returns" language
- Then produce the letter body again but with those hedge clauses removed

### **The user message:**

- Gives the exact JSON schema that must be returned
- Fields include: fund\_name, manager\_name, letter\_date, quarter\_number, quarter\_year, fund\_quarter\_return\_pct
- Also: benchmarks array with name and benchmark\_quarter\_return\_pct
- Also: hedge\_clauses array and body\_text\_no\_hedge
- If something isn't mentioned, return empty string or null, not made up info
- Output ONLY valid JSON with no extra commentary and no Markdown fences
- Appends the full letter text that I extracted with OCR

This is critical: I'm turning fuzzy narrative text into structured fields without writing tons of brittle string-matching code myself. I let the LLM do that structured extraction.

### **How I call the API:**

#### **API call configuration:**

- Use client.chat.completions.create
- Set temperature=0 which means be as deterministic and literal as possible
- I don't want creative writing; I want consistent data extraction
- Use response\_format with type json\_object which forces the model to return valid machine-readable JSON

#### **Error handling:**

- Grab the model's answer string
- Strip code fences if the model accidentally returned json markdown
- Call json.loads to turn that string into a Python dictionary
- Retry up to 3 times if parsing fails
- If it still fails after 3 tries, log a warning and return a fallback dictionary with mostly blanks
- This protects the batch run from dying on one weird PDF

#### **What the returned dictionary looks like:**

I get back a dictionary with:

- fund\_name : the fund's name
- manager\_name : who manages it
- letter\_date : when it was written
- quarter\_number : like 3 for Q3
- quarter\_year : like 2025
- fund\_quarter\_return\_pct : like 9.9 for 9.9% return

- `benchmarks` : array with objects containing name like "S&P 500" and `benchmark_quarter_return_pct` like 5.8
- `hedge_clauses` : array with strings like "Past performance is not indicative of future results"
- `body_text_no_hedge` : the main letter body with those hedge clauses removed

### Why this is insanely useful:

- Now I've got machine-readable numbers as floats and labels as strings that I can analyze at scale
- I also get `hedge_clauses` separately so I can study legal and compliance language across funds
- I also get a cleaned marketing narrative without the legal padding
- This is normally weeks of intern work - I automated it

In [6]:

```
# =====
# 4. LLM extraction
# =====
#
# We're going to send the entire letter text to the OpenAI model and ask for a response.
#   - Identify fund name, manager name, etc.
#   - Identify the "quarter" and year and the fund's stated net performance.
#   - Identify benchmark names + benchmark % returns in the same quarter.
#   - Identify all hedge / disclaimer / forward-looking / "past performance may
#     style clauses AND also softer hedging like "we cannot promise" etc.
#   - Return "body_text_no_hedge" which is the main letter text with those hedge clauses removed.
#
# We instruct the model to *not assume* anything that's not explicitly in the letter.
# e.g. If the manager name isn't in the PDF, leave "".
#
# We also force valid JSON using response_format={"type": "json_object"}, which
# constrains the model to reply with valid JSON only. [oai_citation:12#OpenAI]
#
# NOTE:
# - You may want to use a model with a Large context window (e.g. GPT-4-class models)
# - Update `model_name` below to whatever large-context model you have access to
#
MODEL_NAME = "gpt-4o" # <-- update if needed for your account

def call_openai_extract_structured(letter_text: str) -> Dict[str, Any]:
    """
    Call the model and return a parsed dict.

    Improvements vs your current version:
    - Retries up to 3 times if JSON can't be parsed.
    - Strips accidental ```json fences.
    - Falls back to a safe dict (so pipeline doesn't crash mid-loop).

    Returned dict keys:
        fund_name
        manager_name
        letter_date
        quarter_number
        quarter_year
        fund_quarter_return_pct
    """
    pass
```

```

benchmarks -> [ {name, benchmark_quarter_return_pct}, ... ]
hedge_clauses -> [ "...", "..." ]
body_text_no_hedge -> string
"""

system_msg = (
    "You are a forensic analyst. You read quarterly hedge fund/partnership 1
    "and return STRICT JSON following the schema. "
    "Do not add commentary. Do not assume any fact that's not explicitly in
    "When extracting performance, only use performance explicitly labeled fo
    "described in the letter (e.g. 'third quarter of 2025'). "
    "For manager_name, extract the human signing or clearly identified as po
    "managing member/etc. For fund_name, use whatever the letter calls itsel
    "('The Greenlight Capital funds (the Partnerships)', 'Cedar Creek Partne
    "'Alluvial Fund'). "
    "For hedge_clauses: collect ALL legal disclaimers, forward-looking state
    "risk factor language, offers to invest, 'not indicative of future resul
    "'cannot promise', 'may', 'subject to change', marketing boilerplate at
    "etc. Include each as its own string. "
    "Then create body_text_no_hedge = the original text with *all* hedge_cla
    "Maintain remaining order and wording but it's fine to leave extra blank
)

user_msg = (
    "Return valid minified JSON (no comments, no code fences) with this exac
    "{\n"
    "  \"fund_name\": string,\n"
    "  \"manager_name\": string,\n"
    "  \"letter_date\": string,\n"
    "  \"quarter_number\": int|null,\n"
    "  \"quarter_year\": int|null,\n"
    "  \"fund_quarter_return_pct\": float|null,\n"
    "  \"benchmarks\": [\n"
    "    {\\"name\\": string, \\"benchmark_quarter_return_pct\\": float|null}\n"
    "  ],\n"
    "  \"hedge_clauses\": [string,...],\n"
    "  \"body_text_no_hedge\": string\n"
  }\n\n"
    "Rules:\n"
    "- Only use information explicitly in the letter.\n"
    "- Percentages like 9.9% should be 9.9 (number).\n"
    "- If unknown, use null or \"\".\n"
    "- Output ONLY valid JSON, nothing else.\n\n"
    f"LETTER TEXT:{letter_text}"
)

client = openai.OpenAI()

last_error = None

for attempt in range(3):
    try:
        completion = client.chat.completions.create(
            model=MODEL_NAME,
            messages=[
                {"role": "system", "content": system_msg},
                {"role": "user", "content": user_msg},
            ],
            response_format={"type": "json_object"},
            temperature=0,
        )
    except Exception as e:
        last_error = e
        print(f"Attempt {attempt+1} failed with error: {str(e)}")
        time.sleep(1)
    else:
        break
else:
    print("All attempts failed, giving up after 3 tries.")

```

```

)
content = completion.choices[0].message.content or ""
raw_json = content.strip()

# Safety cleanup in case model accidentally wrapped output:
# `` `json ... `` or `` ... ``
if raw_json.startswith("```"):
    # remove a Leading ```json or ```Lang
    raw_json = re.sub(r"```[a-zA-Z0-9]*", "", raw_json)
    # remove trailing ```
    raw_json = re.sub(r"```\$", "", raw_json)
    raw_json = raw_json.strip()

data = json.loads(raw_json)
return data # success

except Exception as e:
    last_error = e
    # try again with the same prompt

# If we got here, 3 attempts all failed to parse JSON.
# We do NOT crash the pipeline. We emit a fallback dict.
print("WARNING: LLM JSON parse failed, using fallback. Error was:", last_error)

return {
    "fund_name": "",
    "manager_name": "",
    "letter_date": "",
    "quarter_number": None,
    "quarter_year": None,
    "fund_quarter_return_pct": None,
    "benchmarks": [],
    "hedge_clauses": [],
    "body_text_no_hedge": letter_text, # fallback: keep original text if we
}

```

## Step 5: Turning One Letter into Rows of Data

I have a function called `build_rows_for_letter` that glues OCR plus LLM extraction plus finance logic into actual rows for a table. This is where a single PDF turns into 1 or more rows in my final dataset.

### Extract raw text and run LLM:

First, I:

- Call `raw_text = extract_text_from_pdf` on the PDF path
- This is literally everything from that PDF, straight from OCR and text extraction
- Then call `llm_data = call_openai_extract_structured` on that raw text
- This is the parsed dictionary with keys like fund\_name, benchmarks, etc.

### Pull out basic attributes:

I grab these fields from the `lilm_data` dictionary:

- `fund_name` : the fund's name
- `manager_name` : who manages it
- `letter_date` : when written
- `quarter_number` : which quarter
- `quarter_year` : which year
- `fund_quarter_return_pct` : the fund's self-reported return

These will become columns in my final CSV. The idea is: each row tells me "Fund X, managed by Y, for Quarter Z of Year W, reported a return of blank percent."

### **Handle hedge clauses and cleaned body text:**

I process the disclaimer language:

- Get the `hedge_clauses` list - all those disclaimer and "we can't promise future performance" and legal boilerplate sentences
- Join them into one big string separated by blank lines
- Get `clean_body` which is the narrative with those hedge and disclaimer passages removed

### **Why this is gold:**

- For compliance: analyze legal and disclaimer tone over time
- For text analysis: study manager tone, self-justification, macro outlook without repetitive SEC stuff

### **Handle benchmarks:**

Funds often compare themselves to one or more benchmarks. Like:

- "We did +8.7% this quarter"
- "The S&P 500 did +5.8%"
- "The Russell 2000 did +9.9%"

### **My benchmark standardization approach:**

- Keep only two canonical benchmarks: S&P 500 and Russell 2000
- Why? I want consistency and avoid noisy apples-to-oranges comparisons
- Some letters mention lots of things like MSCI World or Russell Microcap - I ignore those in this version

### **How I standardize:**

- Have an internal helper called `canonical_benchmark_name`
- Lowercases the benchmark name
- If it contains "s&p" or "s&p500", map to "S&P 500"
- If it contains "russell 2000", map to "Russell 2000"
- Otherwise return empty string to ignore it
- This standardizes typos and variants like "S&P-500" or "S and P 500"

**Then I:**

- Loop through the benchmarks from llm\_data
- Pick the first occurrence of each canonical benchmark
- Store its stated return
- Build a dictionary mapping benchmark names to their stated returns

**Compute alpha:**

For each benchmark I captured, I compute:

- `alpha_pct = fund_quarter_return_pct - benchmark_quarter_return_pct`

**What is alpha?**

- If fund returned 8.7% and Russell 2000 returned 5.0%, alpha = 8.7 - 5.0 = 3.7 percentage points
- Positive alpha: fund claims to have beaten that benchmark for that quarter after fees
- Negative alpha: underperformance
- This is a crucial investor-relevant KPI: Did the manager actually add value, or could I just have bought an index?

**Build rows:**

For each benchmark like S&P 500 or Russell 2000, I create a row dictionary with:

- `fund_name` : fund's name
- `manager_name` : manager's name
- `letter_date` : when written
- `quarter_year` : year of quarter
- `quarter_number` : which quarter
- `fund_quarter_return_pct` : fund's self-reported percent return
- `benchmark_name` : like "S&P 500"
- `benchmark_quarter_return_pct_stated` : benchmark's percent return as stated in the letter
- `alpha_pct` : fund minus benchmark
- `hedge_clauses` : all the legal disclaimers text
- `clean_body_text` : letter text with disclaimers stripped out
- `raw_text` : full original text from PDF before any cleaning
- `source_pdf` : filename of the PDF I processed

**Important details:****Multiple rows per PDF:**

- Most letters mention multiple benchmarks
- A single PDF can generate multiple table rows - one per benchmark
- That's why I sometimes see the same fund and quarter repeated twice: once for "S&P 500" and once for "Russell 2000"
- This is intentional

### Edge case handling:

- If the letter doesn't mention EITHER "S&P 500" or "Russell 2000", my code still makes ONE row
- This prevents silently losing that PDF from my dataset
- In that fallback row: benchmark\_name is empty string and benchmark/alpha fields are None
- This protects data coverage

In [7]:

```
# =====
# 5. Glue logic:
#   - Loop over PDFs
#   - extract text
#   - call LLM
#   - compute alpha vs benchmarks
#   - build DataFrame
#   - save per-PDF CSV
#   - show cumulative DF after each file
#   - save final ALL CSV
# =====

def build_rows_for_letter(pdf_path: str) -> List[Dict[str, Any]]:
    """
    Process ONE PDF:
        - extract text
        - call LLM
        - keep only S&P 500 and Russell 2000 benchmarks
        - compute alpha (fund minus stated benchmark)
        - return list[dict] rows for this PDF
    """
    raw_text = extract_text_from_pdf(pdf_path)
    llm_data = call_openai_extract_structured(raw_text)

    fund_name = (llm_data.get("fund_name") or "").strip()
    manager = (llm_data.get("manager_name") or "").strip()
    letter_date = (llm_data.get("letter_date") or "").strip()
    qnum = llm_data.get("quarter_number", None)
    qyr = llm_data.get("quarter_year", None)
    fund_q_ret = llm_data.get("fund_quarter_return_pct", None)

    hedge_list = llm_data.get("hedge_clauses", [])
    hedge_text = "\n\n".join(
        [h.strip() for h in hedge_list if h and h.strip()]
    )
    clean_body = (llm_data.get("body_text_no_hedge") or "").strip()

    # === Only allow these 2 benchmarks ===
    # We'll map noisy spellings to canonical names.
    def canonical_benchmark_name(raw_name: str) -> str:
        name_lower = raw_name.lower()
        if (
            "s&p" in name_lower
            or "s&p 500" in name_lower
            or "sp500" in name_lower
            or "s&p500" in name_lower
            or "s&p-500" in name_lower
        ):
            return "SP500"
        else:
            return raw_name
    hedge_text = hedge_text.replace("SP500", canonical_benchmark_name("SP500"))
    clean_body = clean_body.replace("SP500", canonical_benchmark_name("SP500"))

    return [
        {
            "fund_name": fund_name,
            "manager": manager,
            "letter_date": letter_date,
            "quarter_number": qnum,
            "quarter_year": qyr,
            "fund_quarter_return_pct": fund_q_ret,
            "hedge_clauses": hedge_list,
            "body_text_no_hedge": clean_body,
            "benchmark_name": hedge_text
        }
    ]
```

```

        return "S&P 500"
    if "russell 2000" in name_lower:
        return "Russell 2000"
    return "" # not allowed / ignore

# Collect first mention of each canonical benchmark
# picked will look like:
# {
#     "S&P 500": {"stated_ret": 8.2},
#     "Russell 2000": {"stated_ret": 12.4}
# }
picked = {}

for b in llm_data.get("benchmarks", []):
    raw_name = (b.get("name") or "").strip()
    stated_ret = b.get("benchmark_quarter_return_pct", None)

    canon = canonical_benchmark_name(raw_name)
    if not canon:
        continue # skip NASDAQ, Russell Microcap, etc.

    # keep only the first time we see each canon
    if canon not in picked:
        picked[canon] = {"stated_ret": stated_ret}

rows = []

# Build one row per allowed benchmark
for canon_name, info in picked.items():
    bench_ret = info["stated_ret"]

    # alpha = fund_q_ret - benchmark_ret (only if both available)
    alpha_pct = None
    if fund_q_ret is not None and bench_ret is not None:
        alpha_pct = float(fund_q_ret) - float(bench_ret)

    row = {
        "fund_name": fund_name,
        "manager_name": manager,
        "letter_date": letter_date,
        "quarter_year": qyr,
        "quarter_number": qnum,
        "fund_quarter_return_pct": fund_q_ret,
        "benchmark_name": canon_name,
        "benchmark_quarter_return_pct_stated": bench_ret,
        "alpha_pct": alpha_pct,
        "hedge_clauses": hedge_text,
        "clean_body_text": clean_body,
        "raw_text": raw_text,
        "source_pdf": os.path.basename(pdf_path),
    }
    rows.append(row)

# Safety: if neither "S&P 500" nor "Russell 2000" was present,
# still emit one row so we don't lose that PDF.
if not rows:
    row = {
        "fund_name": fund_name,
        "manager_name": manager,
        "letter_date": letter_date,
    }
    rows.append(row)

```

```

        "quarter_year": qyr,
        "quarter_number": qnum,
        "fund_quarter_return_pct": fund_q_ret,
        "benchmark_name": "",
        "benchmark_quarter_return_pct_stated": None,
        "alpha_pct": None,
        "hedge_clauses": hedge_text,
        "clean_body_text": clean_body,
        "raw_text": raw_text,
        "source_pdf": os.path.basename(pdf_path),
    }
    rows.append(row)

    return rows

def run_pipeline(pdf_dir: str = PDF_DIR) -> pd.DataFrame:
    """
    Loop over all PDFs in pdf_dir.
    After each PDF:
        - get that PDF's rows
        - save a per-PDF CSV
        - update cumulative rows
        - print cumulative DataFrame so far
    At the end:
        - save one ALL LETTERS extracted.csv
        - return the final combined DataFrame
    """
    all_rows = []

    for fname in os.listdir(pdf_dir):
        if not fname.lower().endswith(".pdf"):
            continue

        pdf_path = os.path.join(pdf_dir, fname)
        print("\n====")
        print(f"Processing: {pdf_path}")
        print("====")

        # 1. process this PDF
        these_rows = build_rows_for_letter(pdf_path)

        # 2. save per-letter CSV
        df_single = pd.DataFrame(these_rows)

        base_no_ext = os.path.splitext(fname)[0]
        csv_name = f"{base_no_ext}_extracted.csv"
        csv_path = os.path.join(pdf_dir, csv_name)
        df_single.to_csv(csv_path, index=False)
        print(f"Saved per-letter CSV -> {csv_path}")

        # 3. extend cumulative list
        all_rows.extend(these_rows)

        # 4. build cumulative df so far
        df_so_far = pd.DataFrame(all_rows)

        # reorder columns for viewing
        cols_order = [
            "fund_name",

```

```

    "manager_name",
    "letter_date",
    "quarter_year",
    "quarter_number",
    "fund_quarter_return_pct",
    "benchmark_name",
    "benchmark_quarter_return_pct_stated",
    "alpha_pct",
    "hedge_clauses",
    "clean_body_text",
    "raw_text",
    "source_pdf",
]
df_so_far = df_so_far[[c for c in cols_order if c in df_so_far.columns]]

print("CUMULATIVE extracted rows so far:")
display(df_so_far)

# after loop: df_so_far is the final cumulative DF
df_all = df_so_far.copy()

# save master CSV
master_csv_path = os.path.join(pdf_dir, "ALL LETTERS_extracted.csv")
df_all.to_csv(master_csv_path, index=False)
print(f"\nMaster CSV saved -> {master_csv_path}")

# return final DF for convenience
return df_all

```

## Step 6: Running the Pipeline Over a Whole Folder

I have a function called `run_pipeline` that scales this up: not just one PDF, but EVERY PDF in my directory. This is where I batch process hundreds of investor letters in one go.

### **What `run_pipeline` does:**

#### **Step 1 - Initialize:**

- Create an empty list called `all_rows`

#### **Step 2 - Loop through PDFs:**

- Loop through every filename in my `pdf_dir`
- For each file that ends in .pdf, process it by building the full path

#### **Step 3 - Track progress:**

- For each PDF, print something like "Processing: /content/drive/MyDrive/HedgeFund/SomeFund\_Q3\_2025.pdf"
- So I can tell which file I'm on

#### **Step 4 - Process each letter:**

- Call `these_rows = build_rows_for_letter` on that `pdf_path`
- This returns a list of one or more row dictionaries for that PDF

### **Step 5 - Save individual CSV:**

- Turn `these_rows` into a DataFrame called `df_single` using `pandas.DataFrame`
- Extract the base filename without extension
- Create a CSV name like "Fund\_Q3\_2025\_extracted.csv"
- Save `df_single` to that CSV path

**Result:** For each original PDF called Fund\_Q3\_2025.pdf, I'll also get Fund\_Q3\_2025\_extracted.csv sitting in the same folder. That CSV has clean structured rows just from that one letter.

### **Step 6 - Add to master list:**

- Add those rows into my running master list using `all_rows.extend`

### **Step 7 - Display progress:**

- Build a running cumulative "so far" DataFrame from `all_rows`
- Reorder the columns into a nice consistent view with: `fund_name, manager_name, letter_date, quarter_year, quarter_number, fund_quarter_return_pct, benchmark_name, benchmark_quarter_return_pct_stated, alpha_pct, hedge_clauses, clean_body_text, raw_text, source_pdf`
- This is mostly for human readability in the notebook
- Display this dataframe so I see progress as I go
- In Colab, display shows a pretty table

### **Step 8 - Save master CSV:**

After the loop finishes for all PDFs:

- Copy the final cumulative DataFrame to `df_all`
- Write a master CSV called "ALL LETTERS\_extracted.csv" in my `pdf_dir`
- That means I now have one file with ALL the rows for ALL my letters
- Finally, `run_pipeline` returns the final DataFrame so I can keep working with it

### **Actually running it:**

After defining `run_pipeline`, I actually run it by:

- Calling `df = run_pipeline(PDF_DIR)`
- The variable `df` is now my combined dataset across all processed PDFs
- Preview the first 10 rows using `df.head(10)`
- In Colab, `.head(10)` prints a mini-table

```
In [8]: # =====#
# 6. Run it and save results
# =====#
```

```
df = run_pipeline(PDF_DIR)

# Show a preview
df.head(10)
```

```
=====
Processing: /content/drive/MyDrive/HedgeFund/Third Point Partners-7.pdf
=====
Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Third Point Partners-7_e
xtracted.csv
CUMULATIVE extracted rows so far:
```

	fund_name	manager_name	letter_date	quarter_year	quarter_number	fund_quarter_re
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023	3	

=====

Processing: /content/drive/MyDrive/HedgeFund/Alluvial-Capital-Management-Q1-2024-Letter-to-Partners.pdf

=====

Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Alluvial-Capital-Management-Q1-2024-Letter-to-Partners\_extracted.csv

CUMULATIVE extracted rows so far:

	fund_name	manager_name	letter_date	quarter_year	quarter_number	fund_quarter_re
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023	3	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024	1	

=====

Processing: /content/drive/MyDrive/HedgeFund/Alluvial-Capital-Management-Q4-2024-Letter-to-Partners.pdf

=====

Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Alluvial-Capital-Management-Q4-2024-Letter-to-Partners\_extracted.csv

CUMULATIVE extracted rows so far:

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_re</b>
<b>0</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023		3
<b>1</b>	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024		1
<b>2</b>	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024		4



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Processing: /content/drive/MyDrive/HedgeFund/Alluvial-Capital-Management-Q2-2023-Letter-to-Partners.pdf

=====

Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Alluvial-Capital-Management-Q2-2023-Letter-to-Partners\_extracted.csv

CUMULATIVE extracted rows so far:

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_re</b>
<b>0</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023		3
<b>1</b>	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024		1
<b>2</b>	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024		4
<b>3</b>	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023		2



=====

Processing: /content/drive/MyDrive/HedgeFund/Q1+2025+Results+for+Cedar+Creek+Partners.pdf

=====

Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Q1+2025+Results+for+Cedar+Creek+Partners\_extracted.csv

CUMULATIVE extracted rows so far:

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_re</b>
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023		3
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024		1
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024		4
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023		2
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1

=====

Processing: /content/drive/MyDrive/HedgeFund/2024+Results+for+Cedar+Creek+Partners.pdf

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Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/2024+Results+for+Cedar+Creek+Partners\_extracted.csv

CUMULATIVE extracted rows so far:

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_re</b>
<b>0</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023		3
<b>1</b>	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024		1
<b>2</b>	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024		4
<b>3</b>	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023		2
<b>4</b>	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
<b>5</b>	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
<b>6</b>	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
<b>7</b>	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4

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Processing: /content/drive/MyDrive/HedgeFund/Alluvial-Capital-Management-Q2-2025-Letter-to-Partners.pdf

=====

Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Alluvial-Capital-Management-Q2-2025-Letter-to-Partners\_extracted.csv

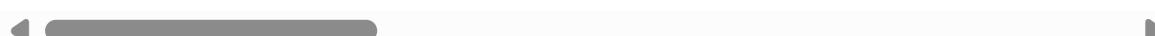
CUMULATIVE extracted rows so far:

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_re</b>
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023	3	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024	1	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024	4	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023	2	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025	2	

&lt;=====

Processing: /content/drive/MyDrive/HedgeFund/Q3+2024+Results+for+Cedar+Creek+Partners.pdf  
=====Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Q3+2024+Results+for+Cedar+Creek+Partners\_extracted.csv  
CUMULATIVE extracted rows so far:

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023		3
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024		1
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024		4
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023		2
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025		2
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3



```
=====
Processing: /content/drive/MyDrive/HedgeFund/Q3+2023+Results+for+Cedar+Creek+Part
ners.pdf
=====
Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Q3+2023+Results+for+Ceda
r+Creek+Partners_extracted.csv
CUMULATIVE extracted rows so far:
```

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023	3	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024	1	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024	4	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023	2	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025	2	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>12</b>	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023		3

=====

Processing: /content/drive/MyDrive/HedgeFund/Q3+2024+Results+for+Cedar+Creek+Partners-2.pdf

=====

Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Q3+2024+Results+for+Cedar+Creek+Partners-2\_extracted.csv

CUMULATIVE extracted rows so far:

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023	3	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024	1	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024	4	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023	2	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025	2	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>12</b>	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023		3
<b>13</b>	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
<b>14</b>	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3

=====

Processing: /content/drive/MyDrive/HedgeFund/Q2+2025+Results+for+Cedar+Creek+Partners.pdf

=====

Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Q2+2025+Results+for+Cedar+Creek+Partners\_extracted.csv

CUMULATIVE extracted rows so far:

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023	3	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024	1	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024	4	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023	2	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025	2	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>12</b>	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023		3
<b>13</b>	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
<b>14</b>	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
<b>15</b>	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025		2
<b>16</b>	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025		2

=====

Processing: /content/drive/MyDrive/HedgeFund/Q1+2024+Results+for+Cedar+Creek+Partners-2.pdf

=====

Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Q1+2024+Results+for+Cedar+Creek+Partners-2\_extracted.csv

CUMULATIVE extracted rows so far:

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023		3
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024		1
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024		4
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023		2
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025		2
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023		3

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>12</b>	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023		3
<b>13</b>	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
<b>14</b>	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
<b>15</b>	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025		2
<b>16</b>	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025		2
<b>17</b>	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024		1
<b>18</b>	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024		1

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023	3	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024	1	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024	4	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023	2	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025	2	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	

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<b>12</b>	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	
<b>13</b>	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
<b>14</b>	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
<b>15</b>	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
<b>16</b>	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
<b>17</b>	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
<b>18</b>	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
<b>19</b>	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
<b>20</b>	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023	3	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024	1	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024	4	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023	2	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025	2	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	

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12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	

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1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024	1	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024	4	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023	2	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025	2	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	

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12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022	2	

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7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025	2	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
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13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022	2	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024		2

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023	3	
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2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024	4	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023	2	
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5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025	1	
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7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024	4	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025	2	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	

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12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	
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14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022	2	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024		2
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023		3
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024		1
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3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023		2
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025		2
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023		3

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12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	
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14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022	2	

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<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024		2
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022		1

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023		3
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024		1
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024		4
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023		2
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025		2
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023		3

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12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	
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14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
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21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022	2	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024		2
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022		1
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023		2
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023		2

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	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
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23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022	2	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024		2
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022		1
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023		2
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023		2
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024		3

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3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023		2
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025		2
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023		3

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022	2	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024		2
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022		1
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023		2
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023		2
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024		3
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023		1
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023		1

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023		3
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024		1
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024		4
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023		2
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025		2
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023		3

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022	2	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024		2
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022		1
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023		2
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023		2
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024		3
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023		1
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023		1
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023		1

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023		3
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2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024		4
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023		2
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025		2
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023		3

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023	3	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024	3	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025	2	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024	1	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025	3	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022	2	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024		2
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022		1
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023		2
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023		2
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024		3
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023		1
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023		1
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023		1
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025		1

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1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024		1
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024		4
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023		2
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025		1
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024		4
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025		2
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023		3

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quart</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023		3
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024		3
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025		2
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025		2
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024		1
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024		1
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024		1
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024		1
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025		3
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025		3
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022		2

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quart</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024		2
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024		2
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022		1
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023		2
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023		2
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024		3
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023		1
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023		1
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023		1
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025		1
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024		4



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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0	1.0	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023.0	2.0	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0	1.0	
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

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**fund\_name manager\_name letter\_date quarter\_year quarter\_number fund\_quarter**

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0	1.0	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023.0	2.0	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
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13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0	1.0	
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
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<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	

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2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
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4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0	1.0	
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>39</b>	Alluvial Fund	Dave Waters, CFA	2023-12-31	2023.0	4.0	

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0	1.0	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023.0	2.0	
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5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
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14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
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16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
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21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
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<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>39</b>	Alluvial Fund	Dave Waters, CFA	2023-12-31	2023.0	4.0	
<b>40</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	July 30, 2025	2025.0	2.0	

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
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2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
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8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
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11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
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21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0	1.0	
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>39</b>	Alluvial Fund	Dave Waters, CFA	2023-12-31	2023.0	4.0	
<b>40</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	July 30, 2025	2025.0	2.0	
<b>41</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>42</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0	1.0	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023.0	2.0	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0	1.0	
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>39</b>	Alluvial Fund	Dave Waters, CFA	2023-12-31	2023.0	4.0	
<b>40</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	July 30, 2025	2025.0	2.0	
<b>41</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>42</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>43</b>	Third Point Offshore Fund, Ltd.		March 31, 2023	2023.0	1.0	

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
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	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
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23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
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<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
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<b>43</b>	Third Point Offshore Fund, Ltd.		March 31, 2023	2023.0	1.0	
<b>44</b>	Alluvial Fund	Dave Waters, CFA	2023-09-30	2023.0	3.0	

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CUMULATIVE extracted rows so far:

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0	1.0	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023.0	2.0	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

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12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0	1.0	
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
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<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>39</b>	Alluvial Fund	Dave Waters, CFA	2023-12-31	2023.0	4.0	
<b>40</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	July 30, 2025	2025.0	2.0	
<b>41</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>42</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>43</b>	Third Point Offshore Fund, Ltd.		March 31, 2023	2023.0	1.0	
<b>44</b>	Alluvial Fund	Dave Waters, CFA	2023-09-30	2023.0	3.0	
<b>45</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>46</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0	1.0	
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8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

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12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
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16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
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21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0	1.0	
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>39</b>	Alluvial Fund	Dave Waters, CFA	2023-12-31	2023.0	4.0	
<b>40</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	July 30, 2025	2025.0	2.0	
<b>41</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>42</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>43</b>	Third Point Offshore Fund, Ltd.		March 31, 2023	2023.0	1.0	
<b>44</b>	Alluvial Fund	Dave Waters, CFA	2023-09-30	2023.0	3.0	
<b>45</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>46</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>47</b>	Alluvial Fund	Dave Waters, CFA	2022-09-30	2022.0	3.0	

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0	1.0	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
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5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0	1.0	
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>39</b>	Alluvial Fund	Dave Waters, CFA	2023-12-31	2023.0	4.0	
<b>40</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	July 30, 2025	2025.0	2.0	
<b>41</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>42</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>43</b>	Third Point Offshore Fund, Ltd.		March 31, 2023	2023.0	1.0	
<b>44</b>	Alluvial Fund	Dave Waters, CFA	2023-09-30	2023.0	3.0	
<b>45</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>46</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>47</b>	Alluvial Fund	Dave Waters, CFA	2022-09-30	2022.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>48</b>	Third Point Offshore Fund	Daniel S. Loeb	October 16, 2024	2024.0		3.0

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0	1.0	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023.0	2.0	
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5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
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17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0	1.0	
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>39</b>	Alluvial Fund	Dave Waters, CFA	2023-12-31	2023.0	4.0	
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<b>43</b>	Third Point Offshore Fund, Ltd.		March 31, 2023	2023.0	1.0	
<b>44</b>	Alluvial Fund	Dave Waters, CFA	2023-09-30	2023.0	3.0	
<b>45</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>46</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>47</b>	Alluvial Fund	Dave Waters, CFA	2022-09-30	2022.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
<b>48</b>	Third Point Offshore Fund	Daniel S. Loeb	October 16, 2024	2024.0		3.0
<b>49</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	August 23, 2024	2024.0		2.0

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7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

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12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
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<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0	1.0	
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

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<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>39</b>	Alluvial Fund	Dave Waters, CFA	2023-12-31	2023.0	4.0	
<b>40</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	July 30, 2025	2025.0	2.0	
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<b>42</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>43</b>	Third Point Offshore Fund, Ltd.		March 31, 2023	2023.0	1.0	
<b>44</b>	Alluvial Fund	Dave Waters, CFA	2023-09-30	2023.0	3.0	
<b>45</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>46</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>47</b>	Alluvial Fund	Dave Waters, CFA	2022-09-30	2022.0	3.0	

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<b>48</b>	Third Point Offshore Fund	Daniel S. Loeb	October 16, 2024	2024.0	3.0	
<b>49</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	August 23, 2024	2024.0	2.0	
<b>50</b>	Cedar Creek Partners	Tim Eriksen	July 28, 2022	2022.0	2.0	
<b>51</b>	Cedar Creek Partners	Tim Eriksen	July 28, 2022	2022.0	2.0	

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0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0	1.0	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
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5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
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<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
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<b>50</b>	Cedar Creek Partners	Tim Eriksen	July 28, 2022	2022.0	2.0	
<b>51</b>	Cedar Creek Partners	Tim Eriksen	July 28, 2022	2022.0	2.0	
<b>52</b>	Cedar Creek Partners	Tim Eriksen	May 03, 2022	2022.0	1.0	
<b>53</b>	Cedar Creek Partners	Tim Eriksen	May 03, 2022	2022.0	1.0	

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<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
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<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

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<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
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<b>46</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>47</b>	Alluvial Fund	Dave Waters, CFA	2022-09-30	2022.0	3.0	

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<b>48</b>	Third Point Offshore Fund	Daniel S. Loeb	October 16, 2024	2024.0	3.0	
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<b>53</b>	Cedar Creek Partners	Tim Eriksen	May 03, 2022	2022.0	1.0	
<b>54</b>	Alluvial Fund	Dave Waters, CFA	2022-12-31	2022.0	4.0	

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<b>36</b>					NaN	NaN
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	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter</b>
48	Third Point Offshore Fund	Daniel S. Loeb	October 16, 2024	2024.0	3.0	
49	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	August 23, 2024	2024.0	2.0	
50	Cedar Creek Partners	Tim Eriksen	July 28, 2022	2022.0	2.0	
51	Cedar Creek Partners	Tim Eriksen	July 28, 2022	2022.0	2.0	
52	Cedar Creek Partners	Tim Eriksen	May 03, 2022	2022.0	1.0	
53	Cedar Creek Partners	Tim Eriksen	May 03, 2022	2022.0	1.0	
54	Alluvial Fund	Dave Waters, CFA	2022-12-31	2022.0	4.0	
55	Alluvial Fund	Dave Waters, CFA	2021-12-31	2021.0	4.0	

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Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Third Point Partners-2\_extracted.csv

CUMULATIVE extracted rows so far:

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0	1.0	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023.0	2.0	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0	1.0	
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>39</b>	Alluvial Fund	Dave Waters, CFA	2023-12-31	2023.0	4.0	
<b>40</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	July 30, 2025	2025.0	2.0	
<b>41</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>42</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>43</b>	Third Point Offshore Fund, Ltd.		March 31, 2023	2023.0	1.0	
<b>44</b>	Alluvial Fund	Dave Waters, CFA	2023-09-30	2023.0	3.0	
<b>45</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>46</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>47</b>	Alluvial Fund	Dave Waters, CFA	2022-09-30	2022.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>48</b>	Third Point Offshore Fund	Daniel S. Loeb	October 16, 2024	2024.0	3.0	
<b>49</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	August 23, 2024	2024.0	2.0	
<b>50</b>	Cedar Creek Partners	Tim Eriksen	July 28, 2022	2022.0	2.0	
<b>51</b>	Cedar Creek Partners	Tim Eriksen	July 28, 2022	2022.0	2.0	
<b>52</b>	Cedar Creek Partners	Tim Eriksen	May 03, 2022	2022.0	1.0	
<b>53</b>	Cedar Creek Partners	Tim Eriksen	May 03, 2022	2022.0	1.0	
<b>54</b>	Alluvial Fund	Dave Waters, CFA	2022-12-31	2022.0	4.0	
<b>55</b>	Alluvial Fund	Dave Waters, CFA	2021-12-31	2021.0	4.0	
<b>56</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	April 30, 2025	2025.0	1.0	

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Saved per-letter CSV -> /content/drive/MyDrive/HedgeFund/Third Point Partners-6\_extracted.csv

CUMULATIVE extracted rows so far:

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0	1.0	
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023.0	2.0	
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0	4.0	
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0	2.0	
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0	3.0	
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0	3.0	
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0	2.0	
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0	1.0	
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0	3.0	
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0	2.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0	2.0	
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0	2.0	
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0	1.0	
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0	2.0	
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0	3.0	
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0	1.0	
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0	1.0	
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0	1.0	
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0	4.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>39</b>	Alluvial Fund	Dave Waters, CFA	2023-12-31	2023.0	4.0	
<b>40</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	July 30, 2025	2025.0	2.0	
<b>41</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>42</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>43</b>	Third Point Offshore Fund, Ltd.		March 31, 2023	2023.0	1.0	
<b>44</b>	Alluvial Fund	Dave Waters, CFA	2023-09-30	2023.0	3.0	
<b>45</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>46</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>47</b>	Alluvial Fund	Dave Waters, CFA	2022-09-30	2022.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_</b>
48	Third Point Offshore Fund	Daniel S. Loeb	October 16, 2024	2024.0	3.0	
49	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	August 23, 2024	2024.0	2.0	
50	Cedar Creek Partners	Tim Eriksen	July 28, 2022	2022.0	2.0	
51	Cedar Creek Partners	Tim Eriksen	July 28, 2022	2022.0	2.0	
52	Cedar Creek Partners	Tim Eriksen	May 03, 2022	2022.0	1.0	
53	Cedar Creek Partners	Tim Eriksen	May 03, 2022	2022.0	1.0	
54	Alluvial Fund	Dave Waters, CFA	2022-12-31	2022.0	4.0	
55	Alluvial Fund	Dave Waters, CFA	2021-12-31	2021.0	4.0	
56	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	April 30, 2025	2025.0	1.0	
57	Third Point Offshore Fund	Daniel S. Loeb	April 30, 2024	2024.0	1.0	

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Out[8]: `fund_name manager_name letter_date quarter_year quarter_number fund_quarter`

	<code>fund_name</code>	<code>manager_name</code>	<code>letter_date</code>	<code>quarter_year</code>	<code>quarter_number</code>	<code>fund_quarter</code>
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0		3.0
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0		1.0
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0		4.0
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023.0		2.0
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0		1.0
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0		1.0
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0		4.0
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0		4.0
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0		2.0
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0		3.0



In [17]: `df`

Out[17]:

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarte</b>
0	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0		3.0
1	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0		1.0
2	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0		4.0
3	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023.0		2.0
4	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0		1.0
5	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0		1.0
6	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0		4.0
7	Cedar Creek Partners	Tim Eriksen	February 10, 2025	2024.0		4.0
8	Alluvial Fund	Dave Waters, CFA	2025-06-30	2025.0		2.0
9	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0		3.0
10	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0		3.0
11	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0		3.0

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarte</b>
12	Cedar Creek Partners	Tim Eriksen	October 22, 2023	2023.0		3.0
13	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0		3.0
14	Cedar Creek Partners	Tim Eriksen	October 23, 2024	2024.0		3.0
15	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0		2.0
16	Cedar Creek Partners	Tim Eriksen	July 23, 2025	2025.0		2.0
17	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0		1.0
18	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0		1.0
19	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0		1.0
20	Cedar Creek Partners	Tim Eriksen	May 5, 2024	2024.0		1.0
21	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0		3.0
22	Cedar Creek Partners	Tim Eriksen	October 21, 2025	2025.0		3.0
23	Alluvial Fund	Dave Waters, CFA	2022-06-30	2022.0		2.0

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarte</b>
<b>24</b>	Alluvial Fund	Dave Waters, CFA	2024-06-30	2024.0		2.0
<b>25</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0		2.0
<b>26</b>	Cedar Creek Partners	Tim Eriksen	July 30, 2024	2024.0		2.0
<b>27</b>	Alluvial Fund	Dave Waters, CFA	2022-03-31	2022.0		1.0
<b>28</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0		2.0
<b>29</b>	Cedar Creek Partners	Tim Eriksen	July 21, 2023	2023.0		2.0
<b>30</b>	Alluvial Fund	Dave Waters, CFA	Third Quarter 2024	2024.0		3.0
<b>31</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0		1.0
<b>32</b>	Cedar Creek Partners	Tim Eriksen	April 25, 2023	2023.0		1.0
<b>33</b>	Alluvial Fund	Dave Waters, CFA	2023-03-31	2023.0		1.0
<b>34</b>	Alluvial Fund	Dave Waters, CFA	2025-03-31	2025.0		1.0
<b>35</b>	Third Point Offshore Fund	Daniel S. Loeb	February 4, 2025	2024.0		4.0

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarte</b>
<b>36</b>					NaN	NaN
<b>37</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>38</b>	Cedar Creek Partners	Tim Eriksen	January 20, 2023	2022.0	4.0	
<b>39</b>	Alluvial Fund	Dave Waters, CFA	2023-12-31	2023.0	4.0	
<b>40</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	July 30, 2025	2025.0	2.0	
<b>41</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>42</b>	Cedar Creek Partners	Tim Eriksen	January 22, 2024	2023.0	4.0	
<b>43</b>	Third Point Offshore Fund, Ltd.		March 31, 2023	2023.0	1.0	
<b>44</b>	Alluvial Fund	Dave Waters, CFA	2023-09-30	2023.0	3.0	
<b>45</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>46</b>	Cedar Creek Partners	Tim Eriksen	October 20, 2022	2022.0	3.0	
<b>47</b>	Alluvial Fund	Dave Waters, CFA	2022-09-30	2022.0	3.0	

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarte</b>
<b>48</b>	Third Point Offshore Fund	Daniel S. Loeb	October 16, 2024	2024.0	3.0	
<b>49</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	August 23, 2024	2024.0	2.0	
<b>50</b>	Cedar Creek Partners	Tim Eriksen	July 28, 2022	2022.0	2.0	
<b>51</b>	Cedar Creek Partners	Tim Eriksen	July 28, 2022	2022.0	2.0	
<b>52</b>	Cedar Creek Partners	Tim Eriksen	May 03, 2022	2022.0	1.0	
<b>53</b>	Cedar Creek Partners	Tim Eriksen	May 03, 2022	2022.0	1.0	
<b>54</b>	Alluvial Fund	Dave Waters, CFA	2022-12-31	2022.0	4.0	
<b>55</b>	Alluvial Fund	Dave Waters, CFA	2021-12-31	2021.0	4.0	
<b>56</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	April 30, 2025	2025.0	1.0	
<b>57</b>	Third Point Offshore Fund	Daniel S. Loeb	April 30, 2024	2024.0	1.0	

In [14]: `import pandas as pd`  
`# Load the CSV file`

```

csv_path = os.path.join(PDF_DIR, "master_extraction.csv")
df_csv = pd.read_csv(csv_path)

# Display the first few rows and the columns and their data types
display(df_csv.head())
display(df_csv.info())

```

	<b>fund_name</b>	<b>manager_name</b>	<b>letter_date</b>	<b>quarter_year</b>	<b>quarter_number</b>	<b>fund_quarter_re</b>
<b>0</b>	Third Point Offshore Fund, Ltd.	Daniel S. Loeb	November 14, 2023	2023.0	3.0	
<b>1</b>	Alluvial Fund	Dave Waters, CFA	2024-04-01	2024.0	1.0	
<b>2</b>	Alluvial Fund	Dave Waters, CFA	2024-12-31	2024.0	4.0	
<b>3</b>	Alluvial Fund	Dave Waters, CFA	2023-06-30	2023.0	2.0	
<b>4</b>	Cedar Creek Partners	Tim Eriksen	April 15, 2025	2025.0	1.0	

<class 'pandas.core.frame.DataFrame'>  
RangeIndex: 58 entries, 0 to 57  
Data columns (total 13 columns):

#	Column	Non-Null Count	Dtype
0	fund_name	57	non-null object
1	manager_name	56	non-null object
2	letter_date	57	non-null object
3	quarter_year	57	non-null float64
4	quarter_number	57	non-null float64
5	fund_quarter_return_pct	57	non-null float64
6	benchmark_name	55	non-null object
7	benchmark_quarter_return_pct_stated	48	non-null float64
8	alpha_pct	48	non-null float64
9	hedge_clauses	57	non-null object
10	clean_body_text	58	non-null object
11	raw_text	58	non-null object
12	source_pdf	58	non-null object

dtypes: float64(5), object(8)  
memory usage: 6.0+ KB  
None

## Step 7: Understanding the Final Output

At the end of my notebook, I load, export, and inspect the data. I call df.head(10) to preview and then later load from "master\_extraction.csv" and call df\_csv.info() to inspect column types and missing values.

### **Let me break down the columns I ended up with:**

#### **fund\_name:**

- Example values: "Third Point Offshore Fund, Ltd.", "Alluvial Fund", "Cedar Creek Partners"
- The names of the investment fund or partnership the letter is about
- Comes from the LLM extraction
- If the LLM can't find it clearly, it leaves it blank

#### **manager\_name:**

- Example values: "Daniel S. Loeb", "Dave Waters, CFA", "Tim Eriksen"
- The human signing or identified as portfolio manager or managing partner
- Pulled by the LLM
- **Why useful:** Lets me attribute tone, performance commentary, and risk language to specific managers

#### **letter\_date:**

- Example values: "November 14, 2023", "2024-04-01", "April 15, 2025", "October 23, 2024"
- Dates mentioned in the letter as the date of writing or distribution
- Helps me line up performance claims with the right time period
- Some letters use US-style "April 15, 2025", some use ISO style like "2024-04-01"
- The model doesn't force formatting; it just reports what it sees

#### **quarter\_year:**

- The year of the quarter being discussed
- Example: if the letter says "first quarter 2025", I get quarter\_year = 2025.0
- These are floats in the output like 2025.0 because pandas inferred them as numbers with possible NaN
- NaN forces the column to be float - that's normal in pandas

#### **quarter\_number:**

- Which calendar quarter they're talking about
- Q1 → 1.0, Q2 → 2.0, Q3 → 3.0, Q4 → 4.0
- Example: "Third Quarter 2024" becomes quarter\_number = 3.0 and quarter\_year = 2024.0
- Parsed by the model from phrases like "third quarter 2024" or "Q3 2024"

#### **fund\_quarter\_return\_pct:**

- The fund's reported net performance for that quarter in percent

- Example rows: 8.7, 0.4, -0.9, 9.9, 5.8
- **What this means:**
  - If the number is 8.7, the fund says "We made +8.7% that quarter"
  - If the number is -0.9, the fund says "We lost 0.9% that quarter"
- These are as stated in the letter - I'm not recomputing them
- **Important:** I'm capturing marketing claims, not necessarily audited fact

#### **benchmark\_name:**

- Usually "S&P 500" or "Russell 2000"
- If it's blank for a row, that PDF didn't mention one of my allowed benchmarks, and I'm in the fallback row
- I intentionally ignore other benchmarks like "NASDAQ" or "MSCI World" in this version

#### **benchmark\_quarter\_return\_pct\_stated:**

- What the letter itself claims the benchmark returned that same quarter
- Example: if the row is for "S&P 500" and the number is 5.8, that means "According to the letter, the S&P 500 returned 5.8% in that quarter"
- This number is pulled out by the model
- I didn't compute it yet, I just recorded what the manager said

#### **alpha\_pct:**

- Calculated by my code as: `alpha_pct = fund_quarter_return_pct - benchmark_quarter_return_pct_stated`
- **Examples:**
  - If fund = 8.7% and benchmark = 5.8%, then alpha = 2.9
  - If fund = 0.4% and benchmark = 2.0%, then alpha ≈ -1.6
- **Interpretation:**
  - Positive alpha: "Fund claims it beat index X by this many percentage points"
  - Negative alpha: "Fund underperformed index X"
- **Why this matters:** Key analytics metric across time and across managers
- **Questions I can answer:**
  - Does Manager A consistently produce positive alpha vs Russell 2000?
  - Does performance concentrate in certain quarters?

#### **hedge\_clauses:**

- A giant text blob of all the disclaimers, legal hedging, "not investment advice", forward-looking statements, risks, "cannot guarantee future performance" language
- **Why capture this?**
  - Compliance and legal tone analysis over time: Are letters getting more cautious?
  - Sentiment analysis without boilerplate: I can remove this from the core message to study tone

- The model is explicitly instructed to gather ALL legal disclaimers, forward-looking statements, risk factor language, offers to invest, "not indicative of future results", "cannot promise", "may", "subject to change", marketing boilerplate
- My code joins them into a single string

#### **clean\_body\_text:**

- The original letter body but with all hedge\_clauses removed
- **Why is this incredible?**
  - I can do text analytics like topic modeling, keyword frequency on what the manager is actually saying
  - Focus on performance, strategy, and outlook without drowning in repeated SEC boilerplate
- **Example use case:** If I want to analyze how often managers mention "inflation", "rates", or "AI" in their core narrative, I should use clean\_body\_text, not the raw PDF

#### **raw\_text:**

- The full text extracted from the PDF before any edits
- This is my ground truth and audit trail
- Includes disclaimers and everything else
- I keep this so I can always go back and confirm accuracy
- **Think:** trust, but verify

#### **source\_pdf:**

- Just the filename of the original PDF that row came from
- **Useful for traceability:**
  - If row index 21 seems weird, I know which original letter to re-check
  - If compliance or legal asks "where did you get that number?", I can point to the exact source PDF

#### **Example row from my output:**

- fund\_name = Cedar Creek Partners
- manager\_name = Tim Eriksen
- letter\_date = April 15, 2025
- quarter\_year = 2025.0
- quarter\_number = 1.0
- fund\_quarter\_return\_pct = 8.7
- benchmark\_name = S&P 500
- Then I see almost the same row repeated with benchmark\_name = Russell 2000
- **Why?** Because the same letter compared performance to multiple benchmarks, so I captured both

#### **Final sanity check:**

At the bottom of my notebook I do `df_csv.info()` which prints:

- How many rows I got, like RangelIndex: 58 entries, 0 to 57
- Each column name
- How many non-null values it has
- The data type like object for text and float64 for numbers
- This is just a sanity check that the export worked and I have the columns I expect

```
In [13]: master_csv_path = os.path.join(PDF_DIR, "master_extraction.csv")
df.to_csv(master_csv_path, index=False)
```

## Step 8: How Someone Can Reproduce This

This is the "give this to a new analyst intern and they can do it" section.

### **Step 1 - Environment:**

Set up the environment:

- Open Google Colab at colab.research.google.com
- Create a new notebook
- In the first cell, install dependencies:
  - Run apt-get update and apt-get install for tesseract-ocr and poppler-utils
  - Then pip install: pdfplumber, pdf2image, pytesseract, pillow, pandas, numpy, yfinance, openai, python-dotenv, rapidfuzz

### **What this gives you:**

- PDF handling with pdfplumber and pdf2image
- OCR with pytesseract and tesseract-ocr
- Data wrangling with pandas and numpy
- Finance data with yfinance
- OpenAI API access with openai

### **Step 2 - Mount or create data folder:**

Set up your data directory:

- In Colab, either mount Google Drive or create a directory
- Set PDF\_DIR to something like "/content/drive/MyDrive/HedgeFund"
- Use os.makedirs with exist\_ok=True to create it
- Upload your hedge fund letters as PDFs into that folder
- Each PDF should be one investor letter like a quarterly update

### **Step 3 - Set OpenAI API key safely:**

Configure your API access:

- In a fresh cell, use os.environ and input to paste your OpenAI API key privately at runtime

- Then import openai and set openai.api\_key from the environment variable
- **Important:** Do NOT commit or share notebooks that include your real key in plaintext
- The copy of my notebook currently has the actual key inline which is risky to publish

#### Step 4 - Copy in the helper functions:

Set up the code:

- Paste in the code blocks from my notebook for:
  - extract\_text\_from\_pdf
  - quarter\_to\_dates
  - get\_index\_return\_pct
  - call\_openai\_extract\_structured
  - build\_rows\_for\_letter
  - run\_pipeline
- Make sure MODEL\_NAME is set to a model your OpenAI account actually has access to
- In my notebook it's "gpt-4o"

#### Step 5 - Run the pipeline:

Execute the extraction:

- Run `df = run_pipeline(PDF_DIR)`

#### What this will do in plain English:

- Loop through every PDF file in PDF\_DIR
- For each PDF:
  - Read the text using OCR if needed
  - Send that text to the OpenAI LLM and get back structured JSON
  - Calculate alpha vs S&P 500 and Russell 2000 if mentioned
  - Save a CSV for that PDF
- After all PDFs are processed:
  - Save ALL LETTERS\_extracted.csv in the same folder
  - Give you a combined DataFrame called df in memory

#### Step 6 - Inspect and analyze:

Check your results:

- To sanity check, run `df.head(10)` and `df.info()`
- You should see rows similar to what I captured

#### What you'll see:

- Fund names like "Cedar Creek Partners", "Alluvial Fund", "Third Point Offshore Fund, Ltd."
- Manager names like "Tim Eriksen", "Dave Waters, CFA", "Daniel S. Loeb"

- The quarter as year plus number
- The fund's percent return
- The benchmark's percent return
- Alpha
- The cleaned body text with compliance language removed
- The filename source for traceability

**What a new analyst could do from here:**

- Sort by alpha\_pct to see strongest outperformance
- Filter by manager\_name to study a single fund over time
- Do text mining on clean\_body\_text to see what threats or opportunities the manager keeps mentioning: inflation, AI, energy policy, etc.
- Study hedge\_clauses across time to see if disclosure language is getting more aggressive which could hint at legal or compliance pressure

## Step 10: Why This Pipeline Matters

Let me connect the dots on why I built this.

**What I've built:**

I've created a repeatable process that does six critical things:

**1. Reads raw PDFs reliably:**

- Even if they're bad scans
- Uses OCR fallback logic automatically

**2. Extracts meaning using AI in a controlled way:**

- Force the AI to give back strict JSON that fits my schema
- Retry logic if it fails
- This prevents the pipeline from breaking

**3. Normalizes benchmarks:**

- Compare apples to apples with "S&P 500" versus "Russell 2000"
- Handles typos and variants automatically

**4. Computes alpha automatically:**

- Crucial for investor performance analysis
- No manual calculation needed

**5. Splits compliance boilerplate from narrative:**

- Lets me analyze "what the manager is really saying" separately from legal cover-your-butt language
- Gold for text analysis and sentiment studies

## 6. Exports everything to CSV:

- Anyone, even non-technical teammates, can open the result in Excel or Power BI
- Start slicing and analyzing immediately

**In other words:** I've created a data product out of unstructured investor communications. That turns hours of manual reading per letter into rows I can filter, chart, and audit.

## The best part for reproducibility:

The steps are deterministic and scripted. As long as someone:

- Installs the dependencies
- Sets their API key
- Points the code at a folder of PDFs
- Runs run\_pipeline

They'll get the same type of structured output and can redo it whenever new letters arrive.

## Final quick summary for stakeholders:

### My input:

- A folder of hedge fund investor letters in PDF form

### My output:

- A CSV table where each row contains:
  - Which fund
  - Which manager
  - Which quarter and year
  - What percent return they claimed
  - What benchmark percent they compared against
  - How much they outperformed or underperformed (alpha)
  - The full text (raw)
  - The cleaned text with legal fluff removed
  - The legal fluff itself
  - The source PDF filename

All of these columns are visible in the final DataFrame and CSV preview in my notebook.

## How it works technically:

- Extract text from PDFs with OCR fallback for sc